



**April 2003**

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# **OZ ENVIRO**

## **Australian Environmental Bulletin**

U.S. Commercial Service, Australia

### **Welcome to the Australian Environmental Bulletin**

This publication contains business intelligence on the Australian environmental market.

Total environmental spending in Australia is around US\$5.3 billion and is forecast to grow at a rate of four percent until 2005. In total, the industry is made up of about 2,500 mostly small firms, employing a total of 100,000 people. Imports currently satisfy 70 percent of the total demand for goods, and about 20 percent of the demand for services.

For further information on the articles in this publication or on any aspect of the Australian environmental market, please contact:

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## Market Wrap for Remediation Equipment & Services

The site assessment and remediation industry is a mature and highly competitive sub sector of the Australian environmental industry.

The types of remediation services provided within Australia include: bio-remediation; thermal treatment / desorption; soil washing; soil vapor extraction; chemical treatments; and stabilization. The most significant type of remediation service is excavation and storage of hazardous waste.

The site remediation sector is dominated in Australia by Theiss Services, an Australia company, with an estimated 70-80 percent market share. Other significant players are Wards Civil, Walkers, Clough, and Earthtech. Numerous smaller firms vie for market share.

The site assessment and audit sector is also extremely competitive and comprises 25 to 50 participants within Australia. Each state-based environmental protection agency provides an accredited listing of site assessors or auditors. A handful of firms, mostly Australian branches or subsidiaries of larger US enterprises, dominate this sector. The major players are URS, ERM, PPK, CH2M Hill, and Environ.

Industry sources value the site assessment and audit sector at around US\$40 million. Site remediation is valued at around US\$50 million. Many feel that both industries peaked in 2001 due to the completion of a number of large-scale remediation projects. The technique of excavation and storage is becoming increasingly unpopular with the regulatory agencies responsible for managing the practices of the remediation industry. This has lead to legislation such as the Contaminated Land Act (1996) that tries to discourage the dumping of hazardous waste if there are other remediation techniques available. Despite this, the comparative cost of fill removal and dumping continues to make this practice economically feasible.

The Australian remediation industry relies, in part, on high-technology goods to supply remediation services. Technology and methods used in the North American market are recognized as more advanced than Australian techniques. Business opportunities exist for U.S.-based technology to improve the services and systems currently available in Australia.

## Potential Water and Wastewater Treatment Projects

State	Agency/Company	Value US\$m	Project
NSW	Pratt Water	150	Modernization of Murrumbidgee Valley irrigation infrastructure
NSW	Sydney Water	120	Upgrade of Liverpool & Glenfield sewage plants.
NSW	Byron Shire Council	14	Upgrade of sewerage system
VIC	Wimmera Mallee Water	180	Open channel-to-pipeline conversion to reduce water loss
VIC	Dept. of Infrastructure	18	Ballarat water reuse treatment facility
QLD	Gold Coast City Council	258	Pimpama-Coomera urban water management project
QLD	QLD Government	108	Urannah Dam, west of Mackay
QLD	QLD Government	72	Nullinga Dam, Walsh River
QLD	Gold Coast City Council	46	Raising the Hinze Dam, stage 3
QLD	Cairns City Council	15	Barron River water supply project
WA	Goldfields Utilities	510	Plant/pipeline to pump desalinated water from Geraldton or Esperance to Goldfields region
WA	WA Water Corporation	450	Kalgoorlie-Boulder WaterLink Project
WA	WA Water Corporation	120	Water desalinization plant

## **Energy Development Programs Underway in Australia**

The Australian Government has committed some US\$226 million in programs to support the commercialization and use of renewable energy technologies and related industry development, and has legislated to create a world-first, guaranteed market for 9,500 GWh of new renewable electricity generation by 2010, through the Mandatory Renewable Energy target.

Both the programs and the mandatory target aim to establish an innovative market in renewable energy and to deliver in excess of US\$1.2 billion of new investment in renewable energy in Australia.

## **Drought Recovery Projects Initiated by Government**

Major on-ground environmental work will take place in drought-affected communities as a result of US\$1.9 million in Federal government funding. The funding is part of the government's US\$6 million Drought Recovery Round which, in turn, is part of the US\$540 million package of measures introduced by the government to help drought-affected Australian communities.

The round of funding involves grants of up to US\$18,000 for community groups to carry out on-ground environmental work in drought-affected areas. Grants range from US\$360 to replant trees that have died in the drought to US\$16,000 to grow stock fodder from native species which are growing well in severe conditions.

With funding from the Drought Recovery Round, land managers are fencing waterways to protect them from damage caused by stock grazing, implementing innovative grazing systems by restricting the area that stock can feed in so other areas can regenerate, and planting trees to stabilize the ground and act as a wind erosion barrier in the longer term. Other projects focus on water quality, protecting native vegetation, and preventing salinity and coastal erosion.

A full list of successful projects in each state that are receiving funding through the Drought Recovery Round of the Australian Government Envirofund is available on the Natural Heritage Trust web site at <http://www.nht.gov.au/projects>.

## **Environmental Spending by Mining & Manufacturing Industries**

Australian mining and manufacturing industries spent US\$825 million on measures to protect the environment in 2000-01, according to figures released by the Australian Bureau of Statistics (ABS). This was approximately one percent of their total expenditure.

The dominant environment protection activities in the mining industry were on waste management (55 percent, or US\$118 million), although there was also significant expenditure on mine sites under rehabilitation (US\$58 million). Western Australia spent more on environmental protection than any other state (43 percent, or US\$91 million). Queensland had the highest expenditure on mine site rehabilitation (US\$23 million).

Land newly disturbed for mining operations was nearly 40,000 hectares and the area of mine sites under rehabilitation held by the mining industry amounted to 35,000 hectares.

Manufacturing businesses spent almost US\$495 million, or 81 percent, of their total environmental expenditure on waste management. Significant expenditure was also spent on administration of environmental protection (US\$74 million). New South Wales and Victoria were the two highest spending states (US\$193 million or 32 percent and US\$172 million or 28 percent respectively).

Combined, the mining and manufacturing industries used over a 1,194 Gigalitres (GL) of water, or more than twice the volume in Sydney Harbor. The mining industry used approximately 401 GL and the manufacturing industry used over 793 GL.

Approximately 57 percent of mining businesses had environmental management plans as a part of their management operations by the end of June 2001. In comparison, 13 percent of manufacturing businesses had environment management plans.

Further information on environmental expenditure by the mining and manufacturing industries is available in the report titled, "Environment Protection, Mining & Manufacturing Industries, Australia, 2000-01 (cat. no. 4603.0)" on the ABS website at [www.abs.gov.au](http://www.abs.gov.au).

## ***Distributor Profiles***

*The following is a list of potential Australian distributors in the Australian environmental market:*

### **Clean Teq Pty Ltd**

38 Kimberly Rd  
Dandenong South, VIC 3115  
Phone: 61-3-9706 4122  
Fax: 61-3-9706 4050  
Email: [info@cleanteq.com](mailto:info@cleanteq.com)  
Web Site: [www.cleanteq.com](http://www.cleanteq.com)

Year Established: 1989      Business Size: Small

Product Description: Design, construction and installation of turnkey systems for biological air pollution control, water and wastewater treatment, resource recovery and bio augmentation for wastewater, agriculture, soil and mining applications.

### **Clearwater Technology Pty Limited**

PO Box 91  
Leura, NSW 2780  
Phone: 61-2-4782 3300  
Fax: 61-2-4782 3211  
Email: [cleartech@msn.com.au](mailto:cleartech@msn.com.au)

Year Established: 1996      Business Size: Small

Product Description: Supplier of equipment for industrial and municipal water and wastewater treatment.

### **Edmonds Products (Australia) Pty. Ltd.**

1/93 South Creek Road  
Dee Why, NSW 2099  
Phone: (61-2) 9972-0600  
Fax: (61-2) 9972-0200  
Email: [aramsay@edmonds.com.au](mailto:aramsay@edmonds.com.au)  
Web Site: [www.edmonds.com.au](http://www.edmonds.com.au)

Year Established: 1934      Business Size: Small

Product Description: Roof valves, chimney and flue improvers, ventilators, domestic/industrial natural ventilation, tubular skylights and louvers, power and solar ventilators, waterproofing and heat barrier coatings, surface coatings, injection molded components. Interested in partnering with U.S. companies involved in ventilation/clean air products.

### **Halley & Mellowes Pty Ltd**

PO Box 5010  
Chittaway, NSW 2261  
Phone: 61-2-4388 4522  
Fax: 61-2-4388 5442  
Email: [msheer@halmel.com.au](mailto:msheer@halmel.com.au)  
Web Site: [www.halmel.com.au](http://www.halmel.com.au)

Year Established: 1966      Business Size: Small

Product Description: Manufacturers of industrial equipment and representatives for overseas manufacturers.

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